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ABSTRACT

The Quality Education Checklist focuses on key inputs, processes, and outputs of schools needed to ensure continuous improvement. Intended as a self-auditing aid for schools, the checklist may also be used as a method to define the priority of areas for improvement, as a way to gather information from customers, as a professional development resource, and as a method of collecting data for accountability reports. The checklist has 10 headings: access, services for customers, leadership, physical environment and resources, effective learning, students, staff, external relations, organization, and standards. These are further divided into 28 subheadings. The checklist may be completed either individually or as a small-group activity. Opportunities for improvement are identified by assessing both the quality and the importance of a particular characteristic and service. There is space for individual comments, for deciding priorities, and for noting successes and improvement opportunities. (MLH)

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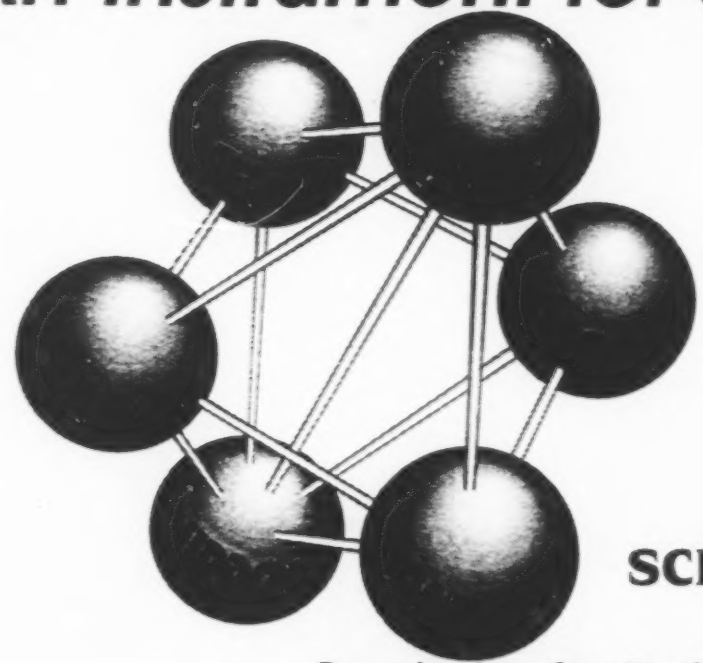
The Quality Education Checklist
An Instrument for Self-Auditing



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&
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Making It Work—

THE QUALITY SCHOOLS APPROACH

Developing Quality Schools: Learning Module #2

EA029194

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Directions

The Quality Education Checklist focusses on the inputs, processes, and outputs of schools which must be attended to to ensure continuous improvement, although it must be emphasized that each of the characteristics is subject to continuous re-definition as the meaning of quality changes. The Checklist is for self-auditing in schools and can be used in many differing ways:

- as a method to determine the priority of areas for improvement
- as a way of gathering information from customers — parents, trustees, students, teachers, administrators, the public, and others
- as a resource for professional development of individuals and teams committed to assessing and improving their contribution to the school and its students
- as a method of collecting data for "accountability" reports to the public and school board officials

The Checklist has ten main headings which appear on pp. 167-174 of the checklist in *Developing Quality Schools: A Handbook*: access, services for customers, leadership, physical environment and resources, effective learning, students, staff, external relations, organization, and standards. These are further sub-divided into a total of 28 sub-headings. It concludes with a section in which items are left blank. Individual schools can add items that relate uniquely to them. The Checklist may be used to assess all of these areas at once for a general overview, or limited to a single area as a part of a focussed effort.

Completing the Checklist

The Checklist can be completed either individually or as a small-group activity; in the first instance, the checklist is completed, scored and the results tabulated and reported. In the second instance, each item is discussed and consensus reached before items are checked. The first method is useful for large or dispersed groups, and for ensuring an "unbiased" perspective. The second is useful for small groups and occasions when the development of a consensus is the primary objective.

The Checklist need not be completed all at once. A group may wish to focus on one section at a time, or to divide responsibility for different sections among groups. Too much data may lead to information overload—focus is important.

The Checklist is based on the notion, outlined on pp. 161 to 166 of the *Handbook*, that opportunities for improvement are identified by assessing **both** the quality and importance of a particular characteristic or service. As seen in the example on the next page, there are two scales for each item: a quality scale— from poor (1) to excellent (5) in the left column, and an importance scale,— from none (1) to extreme (5)— in the right column.

To complete the Checklist, simply check the two appropriate

Maximum Quality Score X Importance 5 x 3 = 15

Quality X Importance 2 x 3 = 6

Target Status 15 - 6 = 9

	Quality: Poor 1 2 3 4 5 Excellent	Importance: None 1 2 3 4 5 Extreme	QxI	5xI (Target)	IO (Improvement Opportunity)	Comments (Current Status)
Access						
• *Point of contact*						
Clear initial contact point for customers	✓	✓	6	15	9	*Need a sign*
Welcoming reception	✓	✓	25	25	0	*Pat's great!*
Short telephone response time	✓	✓	9	15	6	*4 rings*
Advice and guidance readily available	✓	✓	10	25	15	
Survey of how well visitors think they were received	✓	✓	2	10	8	
Clear signage	✓	✓	10	25	15	*Improvement opportunity!*
Point of contact improvement opportunity →			62	115	53	÷ 6 = 8.8
• *Open access*						
Ramps and lifts for physically challenged people	✓	✓	25	25	0	
Community languages on signs and in literature	✓	✓	15	12	3	*On target!*
Open Access improvement opportunity →			40	37	3	÷ 2 = 1.5
Access improvement opportunity →					56	÷ 8 = 7.0

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boxes to the right of each item that reflect your views. In the example, the first item, "Clear initial contact point for customers", has been checked "2" for quality and "3" for importance. The respondent commented, "Need a sign". The second item, "Welcoming reception", was rated excellent at "5" — which was extremely important, also a "5" — and paid a compliment to the receptionist's gracious manner.

The first section of the Checklist, which is used in the example, concerns **Access** to the school; it has two sub-sections: *Point of contact*, with six items, and *Open access*, with two items. **All items must be checked in order to score each section.**

Calculating Your Scores

The purpose of scoring a Checklist is to highlight successes and to determine where improvement opportunities are greatest. In the example on page 3, "improvement opportunity scores" — or IO scores — are calculated for each item, for the two subsections, and for the whole section. The scoring process involves basic arithmetic and could be automated, but manual calculation, along with group discussion, can ensure that the meaning of the results is fully appreciated.

The first step in scoring the Checklist is to multiply the Quality score by the Importance score (Q x I), and to record this in number in the appropriate column.

In the example, the first item, "Clear initial contact point for customers", is scored 2 for Quality and 3 for Importance; the product, 6, is recorded to the right of the item in the column headed "QxI". It reflects the current status.

The second step is to multiply the maximum possible Quality score, which is 5, by the Importance score, and to record this result in the next column, headed "5xI". For the first item, 5 is multiplied by 3, the Importance rating, to get 15. This product can be interpreted as the "target" that is being sought since it reflects both maximum quality and the relative level of importance.

In the third step, the first product, reflecting the current status, is subtracted from the second product, reflecting the target, to yield the Improvement Opportunity score. For the first item, 6 is subtracted from 15 to yield 9, which is recorded under the column headed IO. The larger the IO score, the greater the opportunity for improvement.

After all items within a subsection are scored, it is possible to review the IO scores to determine where the greatest opportunities lie within that group. Within *Point of contact*, the greatest opportunities have IO scores of 15; they are, "Advice and guidance are readily available" and "Clear signage".

The next stage is to calculate the average IO score for an entire section. First, sum the scores under the QxI column and record the number — 62 in the example; then sum the scores under the 5xI column — 115 in the example. Find the difference by subtracting the first from the second, in this case 53. Double check your answer by summing the scores under the IO column. Then, find the average Improvement Opportunity score by dividing 53 by the number of items, 6, to get 8.8. The smallest possible IO score is 0 and the largest possible is 25.

This process is repeated for the next subsection, *Open access*, and results in an average Improvement Opportunity score of 1.5 — meaning that the school is virtually on target for this objective.

To get an overall assessment of improvement opportunities for Access, the total for the IO column is found (53 plus 3 = 56) and divided by 8 to yield 7.0.

Deciding Your Priorities

If an individual, group, or set of groups completes these steps for all sections of the Checklist, then the average Improvement Opportunity scores can be listed in ascending order in the space provided on page 11. The section listed at the top is your greatest success, and should be celebrated with special recognition. The item listed at the bottom has the highest average Improvement Opportunity score, indicating the view that the greatest payoff for concerted effort is in that area. Subsequent attention to subsection averages and item scores can pinpoint where, within an area, work might begin.

Addressing Improvement Opportunities

Chapters 2 and 3 of the *Handbook* describe how teams, processes, and quality tools can be used to analyse systems in order to transform Improvement Opportunities into successful accomplishments.

Using the Checklist for Accountability

Surveys of the views of parents, community members, educational officials and others can be conducted using the Checklist. Data analysis can be automated and summary charts and graphs prepared to display the results in presentations to groups. A Pareto chart (pp. 125 and 126 of the *Handbook*) comparing Improvement Opportunities is one obvious possibility. Too often, of course, statistics seem to be an end in themselves. Don't let that happen in your school.

Regular surveys can be used to collect longitudinal information and display progress made toward achieving higher standards. If progress is made, opportunities for significant improvement will become harder to find.

Many things can influence perceptions, so be careful not to assume that all changes in scores necessarily reflect real changes in quality or importance. Attention to education programs raised in the media or by a single, exceptional incident can over-sensitize persons to particular issues. Try to consider these factors when you and your community interpret the data and use it to decide the focus for your quality improvement projects.

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	Quality (Poor 1 2 3 4 5 Excellent)	Importance (None 1 2 3 4 5 Extreme)	QxI	5xI	IO	Comments
Access						
• *Point of contact*						
Clear initial contact point for customers						
Welcoming reception						
Short telephone response time						
Advice and guidance readily available						
Survey of how well visitors think they were received						
Clear signage						
Point of contact improvement opportunity →						+ 6 =
• *Open access*						
Ramps and lifts for physically challenged people						
Community languages on signs and in literature						
Open Access improvement opportunity →						+ 2 =
Access improvement opportunity →						+ 8 =

	Quality (Poor 1 2 3 4 5 Excellent)	Importance (None 1 2 3 4 5 Extreme)	QxI	5xI	IO	Comments
Services for customers						
• *Advice and guidance*						
Information and guidance service available						
Appropriate pre-entry guidance						
Appropriate continuing guidance available						
Career guidance readily available						
Accessible student wellness and counselling programs						
Advice and guidance improvement opportunity →						+ 5 =
• *Learning resources*						
Well stocked library and resource centre						
Open access to learning resources						
Open access computer facilities available						
Learning resources improvement opportunity →						+ 3 =

	Quality: Poor 1 2 3 4 5 Excellent	Importance: None 1 2 3 4 5 Extreme	QxI	5xI	IO	Comments
• *Social and refreshment*						
Affordable cafeteria facilities available						
Adequate sports facilities available						
Relaxation facilities available						
Opportunities for students to organize their own activities						
Social and refreshment improvement opportunity →						+ 4 =
Services for customers improvement opportunity →						+ 12 =
Leadership • *Principal*						
Has vision and shares it						
"Walks the job"						
Knows the staff						
Knows the students						
Provides and shares leadership						
Gives quality top priority						
Models quality principles						
Principal improvement opportunity →						+ 7 =

	Quality: Poor 1 2 3 4 5 Excellent	Importance: None 1 2 3 4 5 Extreme	QxI	5xI	IO	Comments
• *Values*						
Mission clear and understood						
Equal opportunities policy in place and implemented						
Staff and students understand the school ethos						
Strong commitment to the needs of the community						
Values improvement opportunity →						+ 4 =
Leadership improvement opportunity →						+ 11 =
Physical environment and resources • *Buildings, classrooms, and workshops*						
Clean and attractive						
Fit for purpose						
Contain appropriate visual and learning aids						
Strong commitment to maintaining a safe and secure learning environment						
Buildings, classrooms, and workshops improvement opportunity →						+ 4 =

	Quality: Poor 1 2 3 4 5 Excellent	Importance: None 1 2 3 4 5 Extreme	QxI	5xI	IO	Comments
• *Stimulating learning environment*						
Classroom layouts/individual learning programs exciting to students						
Learning environments well planned and organized						
Stimulating learning environment improvement opportunity →						+ 2 =
• *Health and safety*						
Student perception/incidence logs kept						
Health and safety policies regularly monitored						
Health and safety improvement opportunity →						+ 2 =
• *Resource control and allocation*						
Effective resource control exercised						
Resources controlled by those who use them						
Resource control and allocation improvement opportunity →						+ 2 =
Physical environment and resources improvement opportunity →						+ 10 =

	Quality: Poor 1 2 3 4 5 Excellent	Importance: None 1 2 3 4 5 Extreme	QxI	5xI	IO	Comments
Effective learning						
• *Appropriateness of learning methods*						
Teaching and learning strategies appropriate to course and program goals						
Variety of learning modes available						
Teaching and learning strategies regularly reviewed and measured by a range of specified criteria						
Teaching and learning strategies measured by student response						
Learning is student centred						
Students encouraged to take responsibility for their own learning						
Evaluation methods use to gain customer responses						
Good climate of purposefulness amongst students						
Appropriateness of learning methods improvement opportunity →						+ 8 =

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	Quality: Poor 1 2 3 4 5 Excellent		Importance: None 1 2 3 4 5 Extreme	QxI	5xI	IO	Comments
Appropriateness of the curriculum							
Curriculum appropriate to learners' needs							
Content of course and programs relevant and up-to-date							
Short response time to the development of new course and program content							
Evaluation by clients of the relevance of the offering							
Good liaison with employers and the community on the delivery of courses and programs							
Appropriateness of the curriculum improvement opportunity →							+ 5 =

	Quality: Poor 1 2 3 4 5 Excellent		Importance: None 1 2 3 4 5 Extreme	QxI	5xI	IO	Comments
• *Monitoring and evaluation*							
Student feedback regularly obtained							
Feedback from other customer groups regularly obtained							
Student and community questionnaires used where appropriate							
Institution has formal systems for review and evaluation							
Feedback used in policy-making							
Monitoring and evaluation improvement opportunity →							+ 5 =
Effective learning improvement opportunity →							+ 18 =
Students							
• *Students matter*							
Clear signage							
Clean and well maintained rest rooms							
Student handbooks and guides available							
Staff talk to students							
Absence of artificial barriers							

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	Quality (Poor 1 2 3 4 5 Excellent)	Importance (None 1 2 3 4 5 Extreme)	QxI	5xI	IO	Comments
• *Students matter* (continued)						
Wide range of student services						
Good transportation arrangements						
Range of leisure, recreation, and sporting facilities available						
Students matter improvement opportunity →						+ 8 =
• *Student Satisfaction*						
Good rapport between staff and students						
Happy students and satisfied customers evidenced through surveys and questionnaires						
Students have a sense of pride in their work						
Students kept informed						
Students' views regularly solicited						
Student satisfaction improvement opportunity →						+ 5 =
Students improvement opportunity →						+ 13 =

	Quality (Poor 1 2 3 4 5 Excellent)	Importance (None 1 2 3 4 5 Extreme)	QxI	5xI	IO	Comments
Staff						
• *Attitude and motivation*						
Committed and knowledgeable						
Student centred						
Take responsibility for their own quality						
Have a sense of enjoyment						
Respond readily to individual needs						
Attitude and motivation improvement opportunity →						+ 5 =
• *Teamwork*						
Committed to teamwork and team approaches						
Have been trained in the skills of teamwork						
Have strong cohesion						
Have a clear idea of the limits to their authority						
Have a resource base that allows them to improve quality						
Value and support good practice						
Regularly consulted on policy						
Teamwork improvement opportunity →						+ 7 =

	Quality (Poor 1 2 3 4 5 Excellent)	Importance (None 1 2 3 4 5 Extreme)	QxI	5xI	IO	Comments
• *Staff development*						
Institution committed to developing its staff						
Is proactive and clearly links institutional needs to school vision						
Consults on individual development needs						
Is adequately resourced and funded						
Is an institutional priority						
Includes all staff						
Positive staff development in application of quality principles						
Staff development improvement opportunity →						+ 7 =
• *Facilities*						
Good workrooms						
Adequate and appropriate equipment and facilities						
Opportunities for professional discussion and debate						
Facilities improvement opportunity →						+ 3 =
Staff improvement opportunity →						+ 22 =

	Quality (Poor 1 2 3 4 5 Excellent)	Importance (None 1 2 3 4 5 Extreme)	QxI	5xI	IO	Comments
External relations						
• *Communications*						
Coherent communications strategy						
"Market" research carried out						
Positive seeking out of customer views						
Student and employer questionnaires employed						
Communications improvement opportunity →						+ 4 =
• *Community*						
Excellent links with relevant communities maintained						
Community views regularly solicited						
Strong links with business and industry through partnerships						
Strong links with community agencies through partnerships						
Community improvement opportunity →						+ 4 =
External relations improvement opportunity →						+ 8 =

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	Quality: Poor 1 2 3 4 5 Excellent	Importance: None 1 2 3 4 5 Extreme	QxI	5xI	IO	Comments
Organization						
• *Strategic planning*						
Institution has broad aims and objectives						
Staff at all levels are aware of institutional direction						
Institution has a written strategic plan						
Plan identifies how staff can contribute to success						
Strategic planning improvement opportunity →						+ 4 =
• *Organizational culture*						
Simple and lean structure						
Authority delegated down						
Change is part of the culture						
Universal statement of direction						
Strong commitment to peer evaluation and review						
Based on teamwork						
Learning maximization and prudent risk-taking emphasized						
Tolerance for mistakes						
Organizational culture improvement opportunity →						+ 8 =

	Quality: Poor 1 2 3 4 5 Excellent	Importance: None 1 2 3 4 5 Extreme	QxI	5xI	IO	Comments
• *Communications*						
Good communication seen as major priority						
Bottom-up, not just top down						
Mutuality in communication seen as lifeblood of the institution						
Communications improvement opportunity →						+ 3 =
Organization improvement opportunity →						+ 15 =
Standards						
• *"Hard" standards*						
Excellent results on exams and measures of student success						
High retention rates						
Effective use of resources						
Measures of value-added capabilities in place						
Good student and community feedback based on systematic data collection						
Effective budgetary control						
"Hard" standards improvement opportunity →						+ 6 =

	Quality (Poor 1 2 3 4 5 Excellent)	Importance (None 1 2 3 4 5 Extreme)	QxI	5xI	IO	Comments
• *"Soft" standards*						
Caring atmosphere						
Student welfare and wellness a priority						
Customer service in evidence						
Welcoming environment						
Commitment to learners of all abilities						
"Soft" standards improvement opportunity →						+ 5 =
• *Correct application of standards*						
Rigorous program of self-evaluation in place						
Institution does not measure itself on "hard" priorities alone						
Data are cycled back into improvement initiatives						
Correct applications of standards improvement opportunity →						+ 3 =
Standards improvement opportunity →						+ 14 =

	Quality (Poor 1 2 3 4 5 Excellent)	Importance (None 1 2 3 4 5 Extreme)	5xI	QxI	IO	Comments
Other characteristics						
Other characteristics →						+ -

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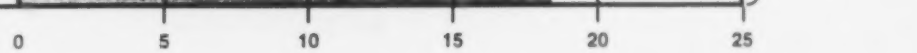
Successes and Improvement Opportunities

Directions: List the ten main section headings from the Checklist in ascending order of their Improvement Opportunity scores, then list and then graph their IO scores to the right of each heading.

SAMPLE

Characteristic	IO	Histogram
Organization	1.5	
Other characteristics	1.7	
Staff	2.0	
Access	2.7	
Leadership	8.0	
Services for customers	8.0	
Physical environment & resources	10.0	
Effective learning	10.5	
External relations	12.0	
Standards	13.0	
Students	18.5	

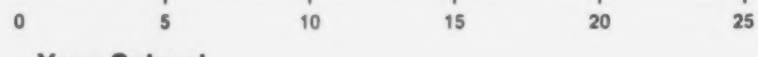


Successes

Improvement Opportunities

Your School

Characteristic	IO	Histogram



Your School